



FRAMEWORK OF SOLUTIONS FOR CUSTOMER EXPERIENCE AND ACCESS: RESOURCE TOOL KIT 1.0

County Welfare Departments (CWDs) Guide

CALIFORNIA DEPARTMENT OF SOCIAL SERVICES
CALFRESH AND NUTRITION BRANCH
REVERSAL OF THE SSI CASH-OUT POLICY IMPLEMENTATION

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CALFRESH ENDING SSI CASH-OUT SUMMER 2019

Framework of Solutions for Successful Implementation

Mission: Reducing hunger and poverty in California for seniors and people with disabilities.

Vision: Excellent customer service and access for all.



- Offer electronic signatures over telephone to accept and complete applications by telephone
- Offer customers flexible interview times by telephone
- Upgrade IVR menu and features:
 - Call back, self service



CLICK

- Maximize Consortia's on-line and mobile application features:
 - Upload verifications, check application status, create accounts
- Promote GetCalFresh.org
- Offer same day service when applicants apply on-line, with telephone interview



COME
IN

- Welcome with Greeter/Customer Service Liaison to assist clients and actively manage lobby
- Upgrade lobby and line management tools
 - Signage, messaging, monitors, on-line terminals, telephones, kiosks
- Offer same day service when applicants come in to apply, with either an in office or telephone interview

STREAMLINE VERIFICATIONS

- Electronic verifications for identity, residence, and SSI income
- Standardized protocols for deductions for medical, dependent care, and shelter

PROVIDE ACCESS FOR ALL

- Reasonable accommodations in all doors
- Multi-language access in all doors
- Authorized representative processes in all doors

COLLABORATE TO HELP CLIENTS APPLY

- County staff from IHSS, Medi-Cal QMB/SLMB/QI-1 cases, multi-program outreach, and other local programs serving people on SSI
- CalFresh Outreach Application assisters, including food banks, area agencies on aging, independent living centers, and more
- All community partners can educate and refer

Get updates here: <http://www.cdss.ca.gov/CalFreshSSI>

Need more information? Send questions here: CalFreshSSI@dss.ca.gov

Introduction

Thank you for accessing the *Reversing the CalFresh SSI/SSP Cash-Out Policy Resource Tool Kit* for County Welfare Departments (CWDs) via SharePoint. We believe it is vital to have input from key stakeholders that represent the interests of the SSI recipient population. Given your experience and expertise, we look forward to compiling your comments and recommendations as we further develop this Resource Tool Kit for CWDs.

We are hoping that this collection method will allow us to include resources from a range of stakeholders in order to produce a comprehensive Resource Tool Kit. This template is not intended to be comprehensive. Rather, it has been designed as a framework to collect ideas and additional information from stakeholders. Please do not assume that our omission of a resource is intentional. If you have valuable background information, an idea, or a relevant resource, please add it. More is better and there is no harm in adding something that has already been discussed to ensure that it is not overlooked.

Please insert additional information into any section. Additions will be considered for inclusion in the final Resource Tool Kit. This tool kit is designed to supplement the previously released *CalFresh Ending SSI Cash-Out Summer 2019: Framework of Solutions for Successful Implementation*. The Framework of Solutions can also be found on this SharePoint site. The *Call, Click* and *Come-In* model highlights three potential solutions for each access point. It is our intention that the Framework of Solutions, the Resource Tool Kit, and the Readiness Plan template, to be released in February, will serve as useful tools to ensure a successful implementation of the reversal of the CalFresh SSI/SSP Cash-Out policy.

If you have any questions or need support navigating the SharePoint site, contact Kathy Yang at Kat.Yang@dss.ca.gov.



1) CALL – Solution A: Electronic Signature

Capture an electronic signature over the phone in order to accept a complete CalFresh application over the phone. Acceptable methods of electronic signature include, but are not limited to, utilization of a Personal Identification Number (PIN) or a recording of a verbal affirmation.

Impact:

- Counties can accept a complete application by phone.
- Beginning date of aid is secured by phone.
- Improves likelihood of same day service by eliminating wait time for client to return a copy of the application with wet signature.
- Allows SSI/SSP recipients to apply for CalFresh without having to physically go into a county office, which may be challenging.
- Alleviates the influx of in-person applicants, reducing likelihood of lobby overcrowding and long in-person wait times.
- Provides another option to accept a CalFresh application; supporting administrative ability to balance workload associated with an influx of new applications during a short window of time.
- Economically vulnerable individuals will be less food insecure.

CWDs Currently Utilizing this Solution (including, but not limited to):

- Santa Cruz County – Intake
- Humboldt County – Intake
- Sacramento County – Intake, SAR 7, and Recertifications
- Kern County – Intake and Recertifications

Key Point of Contacts:

Agency	Contact Name	Contact Email
Humboldt	Jason Wiensz	jwiensz@co.humboldt.ca.us
Sacramento	Linda Hoang	hoangl@saccounty.net
Santa Cruz	Deborah Bresnick	deborah.bresnick@santacruzcounty.us
Kern County	Angela Garcia	garciaan@kerndhs.com

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

- [FNS May 12, 2014 Memorandum titled “SNAP Telephonic Signature Guidance”](#)
- [Don’t Forget to Sign It! - CalFresh Policy](#)
- [CIV Electronic Signature Design Overview – CIV](#)
- [FNS Vision for California Call Centers](#)
- [Sacramento MACF Service Center](#)
- [Santa Barbara BSC](#)
- [San Diego – Improving Customer Experience Presentation](#)
- [Never Get Behind Again – First Contact Resolution article](#)
- [Telephonic Signature in California Counties report](#)
- [San Joaquin E-Signature Policy](#)
- [Kern County E-Signature Policy](#)
- [CDSS – ACL 17-57 – Electronic Signatures in the CalFresh Program](#)
- [FNS – Accepting SNAP Applicant and Client Signatures Electronically](#)
- [Marin E-Signature Policy and Guidelines](#)
- [E-Sign Accessibility Map for SSI Nov 2018](#)
- [Electronic Signatures: New Options for California](#)



1) CALL – Solution B: Flexible Interview

Offer flexible interview slots, within a prescribed window of time, by telephone.

Impact:

- Reduces the number of missed interviews by allowing the customer to complete the interview as convenient for them within a prescribed window of time.
- Reduces calls to the service center regarding missed interviews.
- Reduces the number of applications denied due to missed interviews.
- Has the ability to increase participation.
- Decreases lobby traffic.
- Economically vulnerable individuals will be less food insecure.

CWDs Currently Utilizing this Solution (including but not limited to):

- Stanislaus County
- Marin County

Key Point of Contacts:

Agency	Contact Name	Contact Email
Stanislaus	Teresa Baker	bakert@stancounty.com
Marin	D'Angelo Paillet	dpaillet@marincounty.org

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

- [Flexible Interview Presentation – Stanislaus](#)
- [Stanislaus County Appointment Letter](#)
- [ATC Presentation](#)
- Marin County Appointment Letter (pending)
- [Marin County on Demand Process](#) (pending)



1) CALL – Solution C: Upgrade IVR

Upgrade Interactive Voice Response (IVR) menu and features, including call back, enhanced self-service options, and more.

Impact:

- Allows for prioritization based on client characteristics, such as receipt of SSI, which would allow the elderly and persons with disabilities to spend less time on hold.
- Allows for call routing based on client characteristics, which would allow customers to connect with county representatives that can better help them with their case.
- Alleviates the influx of in-person applicants, reducing likelihood of lobby overcrowding and long in-person wait times.
- Economically vulnerable individuals will be less food insecure.

CWDs Currently Utilizing this Solution (including but not limited to):

- San Bernardino County – Call back feature with voice authentication
- San Diego County – “back door” number for CBO’s

Key Point of Contacts:

Agency	Contact Name	Contact Email
San Bernardino	Dina Christiansen	dchristiansen@hss.sbcounty.gov
San Diego	Ronda Fikes	ronda.fikes@sdcounty.ca.gov
Los Angeles	May Gayton-Jacob	MayGayton-Jacobs@dpss.lacounty.gov

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

- San Bernardino County IVR Phone Tree (pending)
- [Super Self-Service Options – San Bernardino](#)
- [Predictive Handling & Visual IVR](#)
- [FNS guide Call Center/Contact Center Support for States](#)
- [San Bernardino – Customer Service Center](#)
- FNS presentation 2013 – IVR and ADA (pending)
- [Sacramento Call Handling Process – covers Interactive Voice Response/Automated Voice Response](#)
- [Monterey IVR](#)
- Los Angeles County Telephonic Signatures (pending)



2) CLICK – Solution A: Maximize On-Line & Mobile Features

Maximize on-line and mobile application features including, but not limited to, ability to upload verifications, check application status, and create accounts.

Impact:

- Allows customers to submit a complete application through mobile app or desktop computer.
- Reduces lobby and call center traffic to complete tasks that may be done online or via mobile app, such as submitting verifications or checking status of application.
- Reduces call center volume for those checking status of their case.
- Provides convenient access for customers who may not have transportation to visit an office in-person or time to wait on the telephone to speak to a county representative.
- Provides a digital receipt so verification documents are less likely to get lost.
- Economically vulnerable individuals will be less food insecure.

CWDs Currently Utilizing this Solution (including, but not limited to):

- San Mateo County – Customers can complete an Online Customer Service Survey
- Santa Barbara County – Customers can submit verifications using the Outbound Communication Tool Online Providing Uploaded Submissions (OCTOPUS)
- Los Angeles County – Customers can submit verifications and link them to their case

Key Point of Contacts:

Agency	Contact Name	Contact Email
San Mateo	Brenda Gutierrez	bgutierrez@smcgov.org
Santa Barbara	Diana Guerra	d.guerra@sbcsocialserv.org
Los Angeles	Inez Cabrera	inezcabrera@dpss.lacounty.gov

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

- [San Mateo](#)
- [Los Angeles](#)
- [Santa Barbara – Verification Process for GetCalFresh and OCTOPUS](#)



2) CLICK – Solution B: GetCalFresh.org

Promote client friendly application process through GetCalFresh.org.

Impact:

- Customers can apply through a streamlined process.
- Community partners, that may not be as familiar with CalFresh, may be more likely to assist SSI recipients using the streamlined process.
- Allows SSI/SSP recipients to apply for CalFresh without having to physically go into a county office, which may be challenging.
- Alleviates the influx of in-person applicants, reducing likelihood of lobby overcrowding and long in-person wait times.
- Provides another option to accept a CalFresh application; supporting administrative ability to balance workload associated with an influx of new applications during a short window of time.
- Reach wider range of customers who may otherwise not apply.
- Counties that have promoted GetCalFresh.org have seen a significant increase in on-line applications.
- Economically vulnerable individuals will be less food insecure.

CWDs Currently Utilizing this Solution (including but not limited to):

- San Diego County
- Ventura County

Key Point of Contacts:

Agency	Contact Name	Contact Email
San Diego	Ronda Fikes	ronda.fikes@sdcounty.ca.gov
Ventura	Margarita Cabral	margarita.cabral@ventura.org

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

- San Diego data reports showing increase in participation and online apps (Attachment)
- [GetCalFresh – Code for America Presentation](#)
- GetCalFresh – Applying for CalFresh (pending)



2) CLICK – Solution C: Same Day Service

Provide same day service when applicants apply on-line or by telephone.

Impact:

- Provides customers with an opportunity to apply for CalFresh without having to go into a local office.
- Increases the likelihood that applications will be completed and potentially approved.
- Reduces future call backs to customers if they are helped the same day they apply.
- Potentially reduces the overall time spent on application processing.
- Supports the ability to be approved the same day.
- Economically vulnerable individuals will be less food insecure.

CWDs Currently Utilizing this Solution (including but not limited to):

- Santa Clara County – Call placed to customer same day that electronic application is received to conduct interview
- Contra Costa County – Call placed to customer same day that electronic application is received to conduct interview

Key Point of Contacts:

Agency	Contact Name	Contact Email
Contra Costa	Deborah Teixeira	dteixeira@ehsd.cccounty.us
Santa Clara	Kamille-Angelita Reddy	kamille-angelita.reddy@ssa.sccgov

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

- [Santa Clara County Online Application Flow Chart](#)



3) COME IN – Solution A: Greeter

Greeter/customer service liaison provides warm welcome and actively manages lobby to triage client needs.

Impact:

- Make customers feel welcome.
- Properly trained greeters would have the skills to be able to assist SSI recipients with cognitive and physical disabilities.
- Assist customers by providing immediate assistance with directions and general information.
- ADA compliance is understood and prioritized.
- Direct customers to appropriate line.
- Ensure customers with easily resolvable needs are screened for accommodations and provided the appropriate service.
- The ability to triage the lobby to ensure SSI recipients do not wait in long lines due to health concerns.

CWDs Currently Utilizing this Solution (including but not limited to):

- San Joaquin County – Roaming greeter with tablet
- Sonoma County – Navigators in the lobby
- San Bernardino County – Worker with iPad triaging and clearing customers in the lobby

Key Point of Contacts:

Agency	Contact Name	Contact Email
San Joaquin	Brenda Maimone	bmaimone@sjgov.org
Sonoma	Valerie Campbell	vcampbel@schsd.org
San Bernardino	Dina Christiansen	dchristiansen@hss.sbcounty.gov
Los Angeles	Araceli Dominguez	AraceliDominguez@dpss.lacounty.gov

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

- Job description of the Customer Service Liaison (pending)
- [San Bernardino County Intake Process](#)
- [San Joaquin County Roaming Greeter Station pictured](#)



3) COME IN – Solution B: Lobby & Line Management Tools

Upgrade lobby and line management tools including, but not limited to, signage, messaging, monitors, on-line terminals, telephones, and kiosks.

Impact:

- Kiosks may streamline the check-in process.
- Kiosks with online access and telephones may promote submission of an application online or by telephone, reducing wait times for in-person interaction and improving workload management
- Reports can be generated to assist management in increasing program operation efficiency.
- Multiple communication tools, such as an intercom combined with a monitor, ensure that all clients (e.g. those with hearing or visual impairments) are able to effectively communicate with county representatives as needed
- Lobby signage reduces client confusion by utilizing fonts and images that are easy to read and understand.
- Lobby signage is posted in multiple languages.
- Improves customer experience.

CWDs Currently Utilizing this Solution (including but not limited to):

- Riverside County
- Los Angeles County – Lobby signage, expedited processing for customers requiring accommodations
- Yuba County – Lobby signage, priority area in lobby for the elderly and people with disabilities
- Kern County – Designated line for customers requiring accommodations

Key Point of Contacts:

Agency	Contact Name	Contact Email
Kern	Angela Garcia	garciaan@kerndhs.com
Los Angeles	Araceli Dominguez	AraceliDominguez@dpss.lacounty.gov
Riverside	Israel Vasquez	IVasquez@rivco.org
Yuba	Lovena Decamp	cw_cf_ppoc@co.yuba.ca.us

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

- [Riverside County Lobby/Line Management Tool](#)



3) COME IN – Solution C: Same Day Service

Provide same day service in lobby, with an in-person or telephone interview.

Impact:

- Increases program access for all customers.
- Reduces number of missed interviews.
- Provides access to benefits sooner for customers.
- Saves the customer from repeated trips to the county office.
- Economically vulnerable individuals will be less food insecure.

CWDs Utilizing this Solution (including but not limited to):

- Santa Clara County
- Sacramento County
- Yuba County
- San Bernardino County

Key Point of Contacts:

Agency	Contact Name	Contact Email
Sacramento	Linda Hoang	hoangl@sacounty.net
Santa Clara	Kamille-Angelita Reddy	kamille-angelita.reddy@ssa.sccgov
San Bernardino	Dina Christiansen	dchristiansen@hss.sbcounty.gov
Yuba	Lovena Decamp	cw_cf_ppoc@co.yuba.ca.us

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

- Santa Clara workload management and lobby management tools (pending)
- [San Bernardino County Intake Process](#)
- [Yuba County CalFresh Application Workflow](#)

4) STREAMLINE VERIFICATIONS

Streamline electronic verifications for identity, residence, and SSI income. Standardize protocols to claim deductions for shelter, and if applicable, medical or dependent care.

Impact:

- Streamline customer experience with CalFresh.
- Reduce delays processing deductions and increase available benefits to customer.
- Better reflect a customer's need for food assistance, by identifying all deductible expenses.
- Process influx of applications more efficiently.
- Decrease customer confusion with consistent protocols statewide.

CWDs Currently Utilizing this Solution:

-

County Key Point of Contact (to provide more information regarding implementation):

Agency	Contact Name	Contact Email

Resources (Please enter the names of or attach reports, studies, documents, handbooks, workflows or any other supplemental resource materials for inclusion in final Resource Tool Kit):

- SSA/CDSS CalFresh Data Sharing Agreements for County CalFresh Eligibility Purposes
- Reversing the CalFresh SSI/SSP Cash-Out Policy Webinar Series: [Policy Refresher: CalFresh Eligibility Rules for Elderly and/or Disabled Individuals](#)
- CDSS Annual Report on SMD & Deduction Utilization (TBD)

5) PROVIDE ACCESS FOR ALL

Ensure that reasonable accommodations are provided when needed, written and verbal support is available in multiple languages for non-English speakers, and an effective process to identify Authorized Representatives is in place, all across all points of program entry.

Impact:

- Allows all eligible customers to access CalFresh food, income support, and opportunity.
- Increase customer experience satisfaction for all Californians.
- Reduce barriers to participation or lower customer experience satisfaction for some groups of Californians.

CWDs Currently Utilizing this Solution:

-

County Key Point of Contact (to provide more information regarding implementation):

Agency	Contact Name	Contact Email

Resources (Please enter the names of or attach reports, studies, documents, handbooks, workflows or any other supplemental resource materials for inclusion in final Toolkit):

- All-County Letter: CalFresh Rules for Authorized Representatives (forthcoming)
- Reversing the CalFresh SSI/SSP Cash-Out Policy Webinar Series: [Policy Refresher: CalFresh Rules for Authorized Representatives](#)
- Reversing the CalFresh SSI/SSP Cash-Out Policy Webinar Series: [Reasonable Accommodation Best Practices](#)
- CDSS Large print forms/brochures (forthcoming)
- Access Webinar Series: Language Access (forthcoming)
- Access Webinar Series: Serving Customers with Disabilities (forthcoming)
- CDSS CalFresh/SSI Data Dashboard: Key Indicators for Sub-Groups (forthcoming)

6) COLLABORATE TO HELP CLIENTS APPLY

Collaboration between county staff outside of CalFresh (In-Home Supportive Services, Medi-Cal Qualified Medicare Beneficiary/Specified Low-Income Medicare Beneficiary/Qualified Individual-1 cases, multi-program outreach, and other local programs serving people on SSI), CalFresh Outreach Application Assistants (food banks and other local charities, area agencies on aging, independent living centers), and all community partners can educate and assist clients to apply.

Impact:

- Allows for customers to learn about and apply for CalFresh benefits through a network of diverse and trusted partners.
- Provides customers with an opportunity to apply for CalFresh without having to go into a local office or call the county to get started, which may be particularly helpful for seniors and people with disabilities.
- Counties may be able to reduce the volume of in-person or telephone applications, if other county program staff and community assistants are able to assist with applications (particularly via on-line), which can assist counties with managing the high-volume of new applications anticipated after implementation.

CWDs Currently Utilizing this Solution:

- Counties piloting IHSS Strategies: TBD
- Counties with CFO assistants currently: 57 counties
- Counties with GetCalFresh on-line assistants currently: 37 counties

County Key Point of Contact (to provide more information regarding implementation):

Agency	Contact Name	Contact Email

Resources (Please enter the names of or attach reports, studies, documents, handbooks, workflows or any other supplemental resource materials for inclusion in final Toolkit):

- CalFresh Food & the End of SSI Cash-Out Partner Flyer ([English](#)) ([Spanish](#))

- CalFresh Outreach Tool Kits for seniors, people with disabilities, and caregivers (forthcoming)
- Application Assister Webinar: CalFresh 101 (forthcoming)
- Application Assister Webinar: How to Apply for CalFresh 101: Call, Click, Come In (forthcoming)
- SSA Local Office Role in CalFresh Application Screening, Assistance, and Outreach (in progress)
- CDA/Local Area Agencies on Aging Agreement to assist with applications (in progress)
- DOR/Local Independent Living Center Agreement to assist with applications (in progress)
- DDS/Local Regional Centers Agreement to assist with applications (in progress)
- CDPH/Local Community Nutrition Action Plans Agreement to assist with outreach and healthy living programs (in progress)
- CDSS CalFresh/SSI Data Dashboard summary of On-Line, Assister and GetCalFresh applications (forthcoming)